Boost ROI on CRM by effective change management

By Diane Bartlett

CRM software tools have improved almost beyond recognition over the past few years. Where the old systems were clunky, cumbersome and difficult to use, the latest generation boasts seamless integration with tools people are already using every day. The barriers to successful use are much lower than they have ever been before. So why do so many CRM implementations still struggle?

Several years' work implementing CRM in a wide range of organisations points to a single, overarching factor: inadequate change management.

Integral part of company strategy

A successful CRM implementation must be an integral part of overall company strategy, driven by senior executives. But that is not enough: it must also pay very careful attention to the needs, desires and work practices of those who will actually use the system every day.

The need for good change management is greatest where a new CRM system is replacing something that has already been in place for several years. No matter how many problems the old system has or fails to solve, users will have invested a lot of time in learning their way around it. When that accumulated expertise suddenly becomes redundant, it's entirely reasonable to be upset - especially if your position in the office has relied on that expertise.

On the one hand, unless a new system is actively sold to its end users - and they buy it - the most likely outcome is that people will do the bare minimum they can get away with. Minimal compliance will tick all the boxes, but the real value of the system will go undiscovered and unused. On the other hand, genuine and enthusiastic user buy-in will boost the ROI you get out of the system.

Techniques that work

So how do you sell a new CRM system to its users? "We told everybody it was happening" is not change management. Here are some techniques that work:

1. Start at the beginning, when alternatives are being studied and evaluated. Identify the most important users and those who are going to be most affected, discover their needs and then actually meet them where you can. Don't, whatever you do, run a quick survey and then shelve the results while you go ahead and do what you want anyway. This sends a clear message to users that they don't actually matter, and they will act accordingly.

2. Your choice of product counts. A product with a well-designed user interface that is intuitive, easy to use and slots well into existing work practices has a much better chance of success.

3. Recognise that, actually, your end users don't care what the new system is going to do for the company's bottom line and its shareholders; being mostly rational creatures, they care about what it's going to do for them. Sell the actual benefits. If there aren't going to be any - if all the benefits will be felt in the IT department, the finance department or by managers -- acknowledge that too and make a plan to compensate end users somehow.

4. Manage user expectations, and be transparent about what is going on. Don't promise the stars: they've heard it all before, and seen it all turn to dust before. Be clear and honest about what the system will and won't deliver, and keep users posted on its progress.

5. Identify those who are enthusiastic about the change and those who hate the very idea, and deal with each group on its own terms. Assume that the second group has good reasons to be reluctant - they may have learned the hard way to be cynical about flashy new initiatives.

6. Deal with active disruptors and dissenters respectfully and preferably one on one; they are often influential people in their environments. The task is to win them over, not sideline them - a convert can be a very powerful advocate.

7. Make sure your project team and your senior managers buy in both to the vision you are chasing and to the specific product you have chosen. If anybody has reservations, end users will notice - and wonder what they're not being told.

8. Little things count a lot in helping end users feel included, in control and that they are not being lied to. Provide clear project roadmaps and regular updates; have a competition to name the new system; have a proper go-live party.

9. Don't think small. A CRM system, properly used, is an immensely powerful tool for getting to know your customers, listening to them, meeting their needs and ultimately retaining them. It is much more than a simple "up sell and cross sell" opportunity, although that is often how CRM is sold. But if you can't create honest, rewarding relationships with your employees, how will you do it with your customers?

10. Communicate, communicate, and communicate. Don't let users be surprised to discover one day that they have been scheduled for training on a new system they've never heard of before. Don't lie about the reasons for the project, don't over-promise and don't hold back information about how things are going - even when they're going badly.

Costs

There is a cost to doing proper change management, but the costs of leaving it out can be even higher in the long run. If you communicate early, often and honestly with your users, the task of changing over will be immensely easier. If you force compliance on the unwilling, your system will wither and die.

ABOUT THE AUTHOR

As a CRM consultant at Liquid Thought (liquidthought.co.za) for the last five years, Diane Bartlett draws on over 10 years' experience in the local IT market. Her passion for CRM started back in 1999 when she started working for then Voicematix, now AmVia. This passion grew to include change management after joining the customer advocacy team at Dimension Data under the mentorship of Cathy Branquinho. After a two-year break from the IT industry, she joined Liquid Thought Business Solutions, where CRM and change management are the order of the day. Contact Diane via email diane@liquidthought.co.za or tel +27 (0)21 422 2616.